



EVnation Company Overview & Internal Manual

1. Company Overview

EVnation is a California-based company that specializes in the installation of residential and commercial EV chargers. We work closely with car dealerships, electricians, and homeowners to streamline the process of EV charger installation – from load calculation to permitting and final setup. Our mission is to deliver fast, safe, and budget-friendly service with transparency and integrity.

2. Company Organizational Chart & Contact Directory

Name	Role	Phone
Neil Okun	CEO	(949) 309-4255
Alex Livadas	CFO	(949) 309-2466
Jun Kim	Tech Manager	(949) 577-7030
Timothy Vigil	Sales Manager	(949) 309-4188
Raleigh McCormick	Sales Manager	(949) 309-3733
Patrick Park	Permit Specialist	(949) 309-3744
Cameron Rios	Dispatch & Electrical Job Coordinator	(949) 309-2443

3. Case Study Examples

Case 1: Advisor Referral

Ethan Cox was referred by Alex Livadas (FJ Mercedes). The installation was completed successfully. A thank-you email and \$50 Amazon gift card were sent to the advisor.

Case 2: Missing Contact Info

A referral was submitted without a phone number. The team called the dealership directly, confirmed the advisor's identity, and followed up with the gift once verified.

4. Incident Handling Protocol

♦ If a customer reports an issue or complaint:

- Log the issue in the CRM and assign a ticket number
- Notify the Tech Manager (Jun Kim) and appropriate Sales Manager
- Contact the customer within 24 hours with acknowledgment
- Resolve or schedule resolution within 48–72 hours
- Follow up after resolution to ensure satisfaction

♦ For internal technical outages:

- Immediately notify Jun Kim (Tech Manager)
- Use RingCentral group chat to update the team
- Pause affected dispatch or quoting services until resolved



Weekly Operations Checklist

(EVnation Operations Team – Every Friday Completion)



Referral Rewards

- Check **Pipedrive “Won” Deals** this week
 - Confirm installation is complete via Notes
 - Verify advisor contact info (phone/email)
 - Send Amazon/Zelle gift (\$50)
 - Update **Client Referral Tracker** (Google Sheets)
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Installation Pipeline

- Review current **active installs** (scheduled/in progress)
 - Follow up with any stalled or delayed jobs
 - Confirm permit status with Patrick if needed
 - Notify clients of next steps for upcoming installations
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Quoting & Lead Management

- Check for new leads in Pipedrive
 - Assign follow-up tasks to sales team
 - Ensure each lead has: location, panel info, estimated distance
 - Load Calculator used for all quotes
 - Estimate uploaded to Project Pricing Sheet
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Team Communication & Client Follow-up

- All voicemails returned within 24 hours
- RingCentral messages responded to

- Any customer escalations documented
 - Team update sent via internal chat (Friday summary)
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System & Admin

- Check RingCentral account health (status icons)
 - Verify Google Sheets access permissions
 - Back up critical documents to Shared Drive
 - Review website contact form submissions
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EVnation Tool Guide

(Essential Platforms & How to Use Them)

◆ Pipedrive (CRM)

Purpose: Track all leads, advisors, and installations

Login: <https://app.pipedrive.com>

How To:

- Add new client under “Leads” tab
 - Update status as job progresses (Lead → Deal → Won)
 - Use “Notes” section to record install date & comments
 - Use filters to search by Advisor, Dealership, or Date
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◆ RingCentral

Purpose: Team calling & texting

Login: <https://service.ringcentral.com>

How To:

- Call or text advisors using assigned extension
 - Check voicemail under “Messages”
 - Use “Video Pro” tab for internal team meetings
 - Update call disposition after each conversation
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◆ Google Sheets

Purpose: Track referrals, quotes, pricing, electrician info

Key Sheets:

- **Client Referral Tracker** – Referral rewards
 - **EVnation Load Calculator** – For quoting
 - **Installer Reference List** – For dispatch
 - **Pricing Summary** – Estimating & proposals
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◆ Amazon Business Account

Purpose: Send gift cards to Client Advisors

Link: <https://www.amazon.com/gc>

How To:

- Choose \$50 value
 - Select “Send by text”
 - Enter advisor phone number
 - Custom message:
Dear [Name], thank you for referring [Client]. – Patrick @ evNation
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◆ Vercel MasterPage

Purpose: Internal installation summary tool

URL: <https://evnation-master.vercel.app>

Used By: Sales, Tech, Dispatch

Features:

- Client intake form
- Load calculator section
- Printable quote summary
- Installation detail notes